

## There are several ways to work with Fidelity. Which way works best for you?

<i>I would like to...</i>	Available online at <b><u>NetBenefits.com</u></b> or by calling <b>800-343-0860</b>	Talk to a phone-based Retirement Planner at <b>866-715-5959</b>	Visit a Fidelity Investor Center <b><u>Fidelity.com/ branchlocator</u></b>
Enroll in the Trinity Health Plan	✓		
Learn the basics about the Plan	✓		
Check account balances	✓		
Request fund exchanges	✓		
Use interactive planning tools	✓	✓	
Request a form	✓		
Ask general questions	✓		
Discuss Social Security and or Medicare		✓	✓
Find fund performance	✓		
Obtain the Plan enrollment guide	✓		
Develop a comprehensive investment strategy		✓	✓
*Learn more about consolidating retirement plan accounts	✓	✓	✓
Learn about distribution options		✓	✓
Get help with retirement income planning		✓	✓
Change my voluntary retirement savings contribution amount	✓	✓	
Explore retirement savings opportunities outside of the Trinity Health Plan		✓	✓
Learn about investment products and services beyond my Trinity Health Plan		✓	✓
Get help with estate planning and college savings strategies, establishing a trust account, and other advanced financial needs		✓	✓

\*Be sure to consider all your available options and the applicable fees and features of each before moving your retirement assets.

For a complimentary phone consultation, please call **866-715-5959**.

A phone-based **Fidelity Retirement Planner** can help with the following items from the start of your career until you approach retirement:

#### **Getting Started**

- Create a budget
- Student loans/ Paying down debt
- Understanding your plan
- Choosing your investment mix

#### **Mid-Career**

- Saving for a dependent's college
- Maximizing your employer's matching contributions

#### **Pre-Retirement Planning**

- Retirement Income Planning
- Social Security analysis
- Medicare

#### **Planning to call a phone-based Retirement Planner?**

You may want to consider having some materials with you. These are not required – they can only make the time more valuable.

- Any relevant account statements
- Username and Passwords
- Beneficiary names DOB and social security numbers (If not established)
- Social Security Statement (if retiring soon)
- Approximate monthly expenses

Meetings can last 10 minutes or an hour – whatever agrees with your schedule and financial needs. We encourage you to include your spouse, family member, or loved one in the conversation.

Want to get help **on-demand**? Fidelity has resources at the ready.

#### **Visit the Webcast Hub**

Enjoy practical conversations to help you live well financially, today and tomorrow on such topics as:

- Saving & Investing
- Preparing for Retirement
- Managing Life

See what's upcoming and watch previously recorded shows at **[Fidelity.com/webcasts](https://www.fidelity.com/webcasts)**.

#### **Join Fidelity for a complimentary workshop.**

Choose from our library of pre-recorded, on-demand workshops so you can learn online – on your own time.

Or, for a more interactive experience, reserve your spot for a Live Web Workshop. These live, presenter-led workshops are offered each month, presented by a Virtual Education Consultant, and are easy to attend right from your computer.

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Investing involves risk, including risk of loss.

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